MIS 3506
Digital Design and Innovation Studio

4: RESEARCHING YOUR PROJECT + INTERVIEWING SKILLS

Amy Lavin

Schedule:

Scope draft (individual): Thurs 9/29

Interview #2: Tues 9/27 2:00-3:20 / A603 / Rachel Carr, Associate Director, MS Programs

Team Scope: Thurs 9/29

Exam 1: 10/4
Office Hours w/ Derek
Mon/Wed 1-3PM A603
What does elicitiation mean?
How does a BA *elicit* requirements
HOW BA’s Elicit Requirements

• Describe these elicitation techniques and how you would use them:
  – Reviewing existing documentation
  – Observation
  – Interviews
  – Surveys and questionnaires
  – Facilitated sessions
  – Focus groups
  – Competitive analysis
  – Interface analysis
More Methods

• Observation
  – Fly on the wall
  – Contextual
  – Shadowing
  – Secret agent

• Activities
  – Collaging
  – Modelling
  – Draw your experience

• Interviews
  – Directed storytelling
  – Unfocus group
  – Role playing
  – Extreme user
  – Purse or backpack tour

• Self-reporting
  – Journals
  – Beeper study
Saffer’s Advice on Doing Design Research

1. You go to them
2. You talk to them
3. You write stuff down

What’s so hard about that, seems like common sense?
YOU GO TO THEM

Discussion: Trust & Observing
Why do you need to build trust
What is *ethical* research and why do we care
YOU TALK TO THEM

Discussion: Interviewing
Definition of *INTERVIEW*

1: a formal consultation usually to evaluate qualifications (as of a prospective student or employee)

2a : a meeting at which information is obtained (as by a reporter, television commentator, or pollster) from a person

http://www.merriam-webster.com/dictionary/interview
Know your audience
Points of view
What are you

listening/looking for
“If I had an hour to solve a problem and my life depended on the solution, I would spend the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than five minutes.”

Albert Einstein
Interviewing

• Prepare questions in advance
  – What do you want to know?
  – Who is best able to tell you?
    – Executives – Can usually tell you why?
    – Managers – Can usually tell who? where? And what?
    – Workers – Are usually the only ones who can tell you how?

• Ask open ended questions

• Ask follow-up questions using the “reflect” technique
### Stakeholder Analysis: Template

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See pages 62-63 in Memory Jogger
Active Listening

“The reason why we have two ears and only one mouth is that we may listen the more and talk the less.”

— Zeno of Citium
What does it take to listen actively?

1. Pay Attention
2. Show that you are listening.
3. Provide feedback.
4. Defer judgment.
5. Respond Appropriately
Socrates was good at follow-up questions

| Clarification | What do you mean by ____?  
Could you put that another way?  
Can you give me an examples? |
|---------------|--------------------------|
| Probing Assumptions | What are you assuming?  
How did you choose those assumptions?  
What could we assume instead? |
| Probing Reasons and Evidence | How do you know?  
Why do you think that is true?  
What would change your mind? |
| Viewpoint and Perspectives | What are you implying by that?  
What effect would that have?  
What is an alternative? |
| Probing Implications and Consequences | How can we find out?  
Why is this issue important?  
What generalizations can you make? |
| Questions about Questions | What does that mean?  
What was the point of this question?  
Why do you think I asked this question? |

http://www.1000advices.com/guru/communication_questions_socratic.html
YOU WRITE STUFF DOWN

Discussion: Taking Notes
HOW do you take notes
Rich’s Approach to Note Taking

• Prepare your questions in advance
• Take brief notes on comments people make
• If something seems very important or surprising, highlight it
• As soon as possible, review your notes in a quiet setting
• Add observations, conclusions, ideas in another color
• Start a new page with follow-up questions
Exercise:
Dysfunctional Warehouse problem statement, objectives, constraints and assumptions
Dysfunctional Warehouse Case

You have recently been assigned to a project that is focused on improving warehouse operations. The project sponsor, North America’s General Manager, has told you that this is her top priority. She pointed out that customer service has taken so many orders for product that isn’t available that they have had $20MM in orders cancelled by the customer when they found out that delivery would be late. The plants are unhappy because their master production schedule is interrupted about 20 times a week with rush orders. The carriers are raising rates because it takes so long to load their trucks as the warehouse tries to locate the needed product. Having the wrong inventory also costs the business as the product’s shelf life means it has to be sold at a loss if more than 6 months old and scrapped if older than 9 months.

Customer orders are taken by a customer service representative using an new order system, he then checks for the availability of inventory using a separate old inventory system and places a reservation against that inventory. Customer service has no interest in changing out their new system and has told the project so. The shipping team at the warehouse prints the pick list and shipping papers from their inventory system. Warehouse personnel also record inventory as it arrives from the manufacturing sites. After orders are picked and the prepared for shipment, they are loaded onto the carriers trucks for delivery to the customer which the shipping personnel confirm in their inventory system so that the CSR’s can check if needed.

When there is a pending order and no inventory, the customer service team calls the plant and asks them to make a rush order. Rush orders are delivered to the warehouse and often loaded directly onto the carrier’s trucks. Paperwork is often created manually to ensure prompt delivery.

Your first step is to write a scope document to share with your project sponsor to ensure that you have understood the assignment correctly. Please write the following parts of that document:

The problem statement
Five SMART objectives
A list of all relevant assumptions and constraints.
What are the major problems?

3 paragraphs:
General context of the organization
What is the problem?
How will you approach this problem
What are the project objectives?

Specific
Measureable
Actionable
Realistic
Time-bound
What are the relevant assumptions and constraints?
INDIVIDUAL Scope Documents

DUE Thursday.

Bring 2 prints to class
MIS 3506
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HEURISTIC Review
definition: heuristic

: involving or serving as an aid to learning, discovery, or problem-solving by experimental and especially trial-and-error methods

<heuristic techniques> <a heuristic assumption>;

: of or relating to exploratory problem-solving techniques that utilize self-educating techniques (as the evaluation of feedback) to improve performance

<a heuristic computer program>

http://www.merriam-webster.com/dictionary/heuristic
Self-educating techniques to improve performance
How do you develop a Heuristic Review to use?
Part 1:
Develop a **Heuristic Review**

Each team should work together to develop a review heuristic for evaluating each other’s scope documents.

Create a general assessment framework in outline form with questions you would ask yourself about the other person’s scope document.
Your questions should generate constructive criticism and suggestions for improvement.

The number of questions for each dimension is up to each team and should represent relevant information needed.

This week focus your heuristic review on Scenarios.
Did your heuristic include the following?
Project Scope Document Contents

• Statement of Purpose (Problem Description)
• Objectives
  • Problems & Opportunities
  • Risks
• Assumptions and Constraints
• Stakeholders Analysis
• Glossary
Does the Statement of Purpose

• Explain the current environment or situation?
• Describe the problem?
• Explain why its important to your client?
• Explain how you will approach it?

• Are there 3 clear and well written paragraphs?
  – General context of the organization and the current condition
  – The essential problem or opportunity
  – Your team’s approach to analyzing the problem and designing a solution
Are the Objectives Relevant and SMART?

Specific
Measureable
Actionable
Realistic
Time-bound
Assumptions & Constraints

• Assumption – a premise that is assumed to hold true throughout the project
  – ARE THE ASSUMPTIONS RELEVANT AND NECESSARY FOR THE PROJECT?

• Constraint – a limitation or restriction on proposed solutions
  – ARE THESE CONSTRAINTS TO THE SOLUTION?
SCOPE Review
Constructive Feedback

• Ask open-ended questions and follow-up on the answers
• Ask why, what, when, where, who and how
• Set a positive, helpful tone
• Identify weaknesses, discuss them and then suggest improvements
• Identify strengths, discuss them, and then offer extensions
Review Process: **SCOPE**

1. Teams sit together / Split into 2 groups (2 or 3 people)
2. Exchange your scope document with someone from your team
3. Read each other’s scope documents carefully and take detailed notes on what you think is good and what needs improvement. *10 minutes*
4. Take the lead and give the other person your feedback, then switch it around. Take your time and discuss each point. *10 minutes for each person*

**USE ALL THE TIME YOU ARE GIVEN**

5. I’ll select two random people to review their scope documents with the class
As a TEAM begin to consolidate your work into one document. Begin by selecting the best of each
Schedule:

Interview 2: **Tues 9/27**

Exam 1: **Tues 10/4**
  - 1 hour
  - 30-40 multiple choice questions
  - Scope document analysis case study
  - Readings/lectures/exercises